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# VIEW REPORTS

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## **User's Guide**

### **Washington Public Disclosure Commission**

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## **Disclaimer**

This User’s Guide contains detailed information about using VIEW REPORTS and was written and designed by Mark Johnson, Public Disclosure Commission. Information in this document is subject to change without notice. Campaigns, candidates, names and data used in examples herein are fictitious unless otherwise noted.

**Note:** VIEW REPORTS is not currently supported under Netscape 3.x, 6.x, or Internet Explorer 6.x.

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## **Technical Support**

If you have any questions or problems with the installation or use of VIEW REPORTS, you may contact the Public Disclosure Commission ([pdcc@pdcc.wa.gov](mailto:pdcc@pdcc.wa.gov)) directly at: 360-753-1111 or 1-877-601-2828

# Search Criteria Page

The Search Criteria page is the default page for VIEW REPORTS. It displays the index fields for the VIEW REPORTS application. Because unique index information is attached to each stored document, those documents can be retrieved by searching for values contained in the index. These search options include [Search by Index](#), [Search by Wildcard](#), [Search by List of Values](#), [Expression Search](#), and [Combination Search](#).

Show	Index Name	Search Value	Click for Help
<input checked="" type="checkbox"/>	FILER NAME		<a href="#">Show Choices</a> R L
<input checked="" type="checkbox"/>	FORM TYPE		<a href="#">Show Choices</a> R L
<input checked="" type="checkbox"/>	ELECTION YEAR		<a href="#">Show Choices</a> R L
<input checked="" type="checkbox"/>	OFFICE SOUGHT		<a href="#">Show Choices</a> R L
<input checked="" type="checkbox"/>	DATE RECEIVED		<a href="#">Show Choices</a> R L
<input checked="" type="checkbox"/>	DESCRIPTION/PARTY		<a href="#">Show Choices</a> R L
<input checked="" type="checkbox"/>	BALLOT NUMBER		<a href="#">Show Choices</a> R L
<input checked="" type="checkbox"/>	LEGISLATIVE DISTRICT		<a href="#">Show Choices</a> R L
<input checked="" type="checkbox"/>	BATCH NUMBER		<a href="#">Show Choices</a> R L

[Send Query](#) [Clear](#)

**Note:** VIEW REPORTS automatically detects what operating system and browser you are using and displays the corresponding user interface; similar to the screenshot above.

## Index Field Search Criteria

VIEW REPORTS provides flexible options for document searching by index value. Exact index information can be entered as [search criteria](#), or [lists of values](#) and [ranges](#) can be entered. You can also search for documents by using [wildcard criteria](#) in your searches. When queries are executed, a [Result Set](#) page appears, listing document index records that met the search criteria you entered.

**Note:** If no search results are retrieved, the Result set will display a “No documents found” message and return you to the Search Criteria page.

## Index Field Search Criteria

Option	Description
<b>Show</b>	This option allows you to choose which index fields you would like to be displayed as columns in the Result Set page.
<b>Index Name</b>	All searchable index fields are listed for the current application.
<b>Search Value</b>	Used to enter known index data for searching the current application for documents. The Range search and List of Values search buttons allow you to create Range and List of Values search syntax.
<b>Click for Help</b>	Brings up the help.
<b>Show Choices</b>	Displays all currently available choices for that particular index.
<b>R</b>	Allows you to narrow your search by searching by expression.
<b>L</b>	Allows you to narrow your search by searching by a list of values.
<b>Send Query</b>	Submits your query to the database for resolution.
<b>Clear</b>	Clears all current search values and re-checks all show check boxes.

VIEW REPORTS offers several features that allow you to reduce the amount of time spent performing data entry of index information. Auto Index and the Key Reference can be used during document indexing to automatically fill in all or part of a document's index.

## Search by Index

You can find a document or set of documents by entering known index data as search criteria. Entering precise information in more than one field will narrow the search.

### To search for documents using known index information

Enter index data in the Search Value text box for at least one field and click **Send Query**. The [Result Set Page](#) displays a list of document records retrieved by the search.

## Expression Search (“R” Button)

You can also find documents by entering a range of possibilities for each index field by entering an Expression into the desired index field. This feature gives you more options for narrowing down your search within an index field. VIEW REPORTS can help you compose your expression through an expression editor, accessible from the Range (**R**) button.

### To search for documents using an expression

Click on the **R** (Range) button located next to the Search Values text box that you would like to search for values within. The Expression Editor will appear. From the **Type of Comparison** drop-down list, choose *Between [ ]*, *Greater Than >*, *Greater Than Or Equal >=*, *Less Than <*, or *Less Than Or Equal <=*. Enter a value within the **Value** text box. If you have chosen *Between [ ]*, remember to enter a value in the **And** text box. Click **OK**. When you return to the [Search Criteria](#) screen, you will find the Expression syntax located within the Search Value text box. Click on **Send Query** to submit your query. The [Result Set Page](#) displays a list of document records retrieved by the search.

#### Expression Syntax

Expression	Symbol	Example of correct Syntax
<b>Between</b>	[ , ]	Expression:['1','2']
<b>Greater than</b>	>	Expression:>2222.00
<b>Greater than or equal to</b>	>=	Expression:>=2222.00
<b>Less than</b>	<	Expression:<2222.00
<b>Less than or equal to</b>	<=	Expression:<=2222.00

**Note:** The expression syntax *must* be entered in the *exact* format. Any variance will result in a non-valid search with no results. Use the Expression Editor, accessible through the **R** (Range) button, to ensure a correctly formatted expression.

## Expression Operators

The Expression option finds documents using a Search Expression. You build a Search Expression by combining the words or text strings that you want to search for with expression operators such as “**and**” and “**or**”. You can combine operators for a more complex search. VIEW REPORTS interprets the search expression from left to right.

### Expression Operators

Operator	Description
<b>and</b>	When you use the <b>and</b> operator between two words, VIEW REPORTS searches for documents that contain both words.
<b>or</b>	When you use the <b>or</b> operator between two words, VIEW REPORTS searches for documents that contain at least one of the words.
<b>and not</b>	When you use the <b>and not</b> operator between two words, VIEW REPORTS searches for documents that contain the first word, but not the second.
<b>near ()</b>	When you use the <b>near ()</b> operator after two words, VIEW REPORTS searches for documents in which both words occur in any order, within a range that you specify between the parentheses.
<b>Character wildcard</b>	When you use a question mark (?) in a string of text, VIEW REPORTS searches for documents that contain that string of text, but allows any single character to take the place of the question mark.
<b>String wildcard</b>	When you use an asterisk (*) in a string of text, VIEW REPORTS searches for documents that contain that string of text, but allows any number of characters or even the lack of a character to take the place of the asterisk.
<b>Parentheses</b>	By default, VIEW REPORTS interprets a search expression from left to right, interpreting each search operator one at a time, and narrowing the results with each subsequent search. You can use parentheses to group search expressions to control the order in which VIEW REPORTS performs these searches. When you use parentheses in an expression, VIEW REPORTS searches first for documents that contain the expression in parentheses.
<b>Backslash</b>	By default, when you use symbols such as question marks (?), asterisks (*), or parenthesis, VIEW REPORTS interprets these characters as operators. If you want to search for these and many other symbols, you must precede each one with a backslash (\).

### Examples of Expression Operators

Operator	Example	VIEW REPORTS Finds Documents With&ldots;
<b>And</b>	PDC <b>and</b> Mark	Both PDC and Mark.
<b>Or</b>	PDC <b>or</b> Mark	Either PDC or Mark.
<b>And not</b>	PDC <b>and not</b> Mark	PDC but not Mark.
<b>Near ()</b>	PDC Mark <b>near</b> (20)	Both PDC and Mark, within a range of 20 words of each other.
<b>?</b>	P?C	A string of 3 consecutive characters, in which the first must be P, the second may be any character, and the last must be C.
<b>*</b>	S*	Any string that begins with S.
<b>()</b>	PDC and (Mark or Johnson)	Either Mark or Johnson first, and of those documents, AX finds ones that also have PDC.
<b>\</b>	\(PDC ?\)	(PDC?).

The following table lists each of the symbols and characters that must be preceded by a backslash (“\”) if you want VIEW REPORTS to take them literally in a full-text search expression.

### Characters That Must Be Preceded by a Backslash

Character Name	Symbol	Character Name	Symbol	Character Name	Symbol
<b>Parentheses</b>	()	<b>Question mark</b>	?	<b>Number sign</b>	#
<b>Brackets</b>	[]	<b>Pipe</b>		<b>Colon</b>	:
<b>Angle brackets</b>	<>	<b>Ampersand</b>	&	<b>Backslash</b>	\
<b>Double quotes</b>	"	<b>Caret</b>	^	<b>Blank space</b>	
<b>Asterisk</b>	*	<b>Tilde</b>	~	<b>Null</b>	

## Search by Wildcard

The asterisk (\*) is a wildcard that matches any character or number of characters. A wildcard performs beginning with, ending with, and pattern searches. For example, SM\* finds all the text strings beginning with the letters SM. The wildcard character can be used to narrow a search, controlling the number of documents returned in the Result Set page.

**Note:** Wildcards are only valid for text fields.

The following table shows how the wildcard character works.

### Wildcard search specifications

Search Specification	Result
SMITH	Returns all documents with the name "SMITH".
SM*	Returns all documents with names that begin with the characters "SM".
*ITH	Returns all documents with names that end with the characters "ITH".
S*H	Returns all documents with names that begin with the character "S" and end with the character "H".
*ITH*	Returns all documents with names that contain the character pattern "ITH".

**Note:** The wildcard character should never be specified by itself in a field for searches. This performs a search on the entire database and will negatively impact system performance on multi-user network systems.

## To search for documents using wildcard characters

VIEW REPORTS displays a Search Criteria page that contains the index fields for the chosen application. Enter index data in the Search Value text box for at least one field, and click **Send Query**. VIEW REPORTS searches the active application for all records that match the criteria. If an incorrect value is entered as a search criteria item, a dialog box appears, which states that the field value is invalid and indicates the correct data format for the field. If documents that match the criteria are found, VIEW REPORTS displays the [Result Set Page](#).

## Search by List of Values (“L” Button)

List of Values logic allows you to define as many alternatives for every search field as you wish. In the Search Criteria dialog box, for example, you could enter ‘123-45-6789’, ‘111-11-1111’, and other Social Security numbers to search for multiple values.

VIEW REPORTS will locate all documents that contain any entry in that field. All documents with ‘123-45-6789’ in the SSN field *and* all documents with ‘111-11-1111’ (as well as any others you added) are located and listed in the Result Set page. By allowing you to specify more alternatives, the List of Values operation allows inclusive searches that retrieve a larger set of documents. VIEW REPORTS can help you compose your List of Values search using the List of Values editor, accessible from the List of Values (L) button.

## To search for documents using a List of Values search

Click on the **L** (List of Values) button located next to the Search Values text box that you would like to search for values within. The List of Values Editor will appear. Enter a value for the list in the **Field Value** text box. Click **Add** to add the value to the list. Repeat the previous 2 steps for each value you would like to include. To replace a pre-existing value with a new value, select the value from the list box, enter a new value in the **Field Value** text box, and click **Replace**.

### To delete a single value

Select the value from the list box, and click **Delete**.

## To delete all values

Click **Delete All**.

When you have finished adding values, click **Ok**. To close the List of Values editor without creating a list, click **Cancel**. Click **Send Query**. The [Result Set Page](#) appears.

## Combination Search

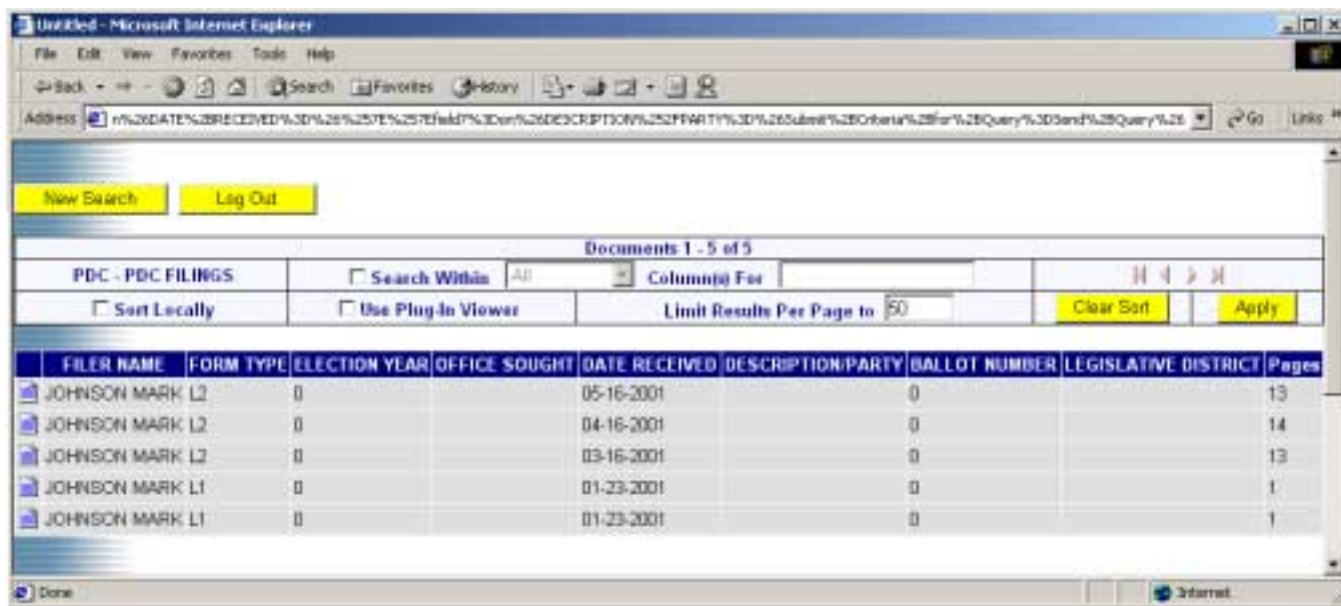
You can also search for documents using both index data and full-text. This combination search combines the searching power of both the [Search by Index](#) and the [Full-Text Search](#).

## To search for documents using a combination search

Enter index data in the [Index Field Search Criteria](#) text box and full-text data in the Full-Text Search Criteria text box. Click **Send Query**. The [Result Set Page](#) appears.

## Result Set Page


When documents match specified search criteria, all matched indexes are displayed in a query result set. The Result Set page displays a list of documents whose records match the search criteria. The records are displayed in a table format, with a column for the index values of each index field. From this page, you can select a document to view. Results can be sorted in ascending or descending order, based on index term. The Result Set page varies depending on the type of search performed. The different search types include [Search by Index](#), [Search by Wildcard](#), [Search by List of Values](#), [Expression Search](#), and [Combination Search](#).



Documents 1 - 5 of 5								
PDC - PDC FILINGS		<input type="checkbox"/> Search Within All		Column(s) For				
<input type="checkbox"/> Sort Locally		<input type="checkbox"/> Use Plug-In Viewer		Limit Results Per Page to 50		<input type="button" value="Clear Sort"/> <input type="button" value="Apply"/>		
FILER NAME	FORM TYPE	ELECTION YEAR	OFFICE SOUGHT	DATE RECEIVED	DESCRIPTION/PARTY	BALLOT NUMBER	LEGISLATIVE DISTRICT	Pages
JOHNSON MARK L2	0			05-16-2001		0		13
JOHNSON MARK L2	0			04-16-2001		0		14
JOHNSON MARK L2	0			03-16-2001		0		13
JOHNSON MARK L1	0			01-23-2001		0		1
JOHNSON MARK L1	0			01-23-2001		0		1

**Note:** The appearance of the Result Set page differs for users of Internet Explorer 5.x and users of Internet Explorer 4.x/Netscape 4.x. For users of Internet Explorer 5.x, VIEW REPORTS implements an XML-based Result Set which provides enhanced display and sorting features. The enhanced display and sorting features allow you to change viewing options on the fly for the current query results.

## Result Set Toolbar Options

Option	Usage
<b>Limit Result Per Page to *</b>	Enter the number of results that you want to appear on each page and then click Apply.
<b>Sort Locally *</b>	Enable this checkbox to sort items that were returned by the current query only. If the checkbox is disabled, a sort will re-query the entire database, retrieving documents that may have been outside the parameters of the original search. For example, if your queries are limited to 100 results, but there are 1000 matching documents in the database, you could re-sort the Result Set such that documents that had not initially populated the Result Set are retrieved.
<b>Search Within Column(s) For *</b>	Choose a column from the Search Within list box and then type text to search for in the Column(s) For text box and click Apply to display results whose index terms match your specified criteria.
<b>Apply *</b>	Click Apply to apply changes.
<b>Clear Sort</b>	If you have sorted the Result Set, you can click Clear Sort to display the document list sorted in the original order (the order used when the Result Set page was first displayed).
<b>Use Plug-in Viewer</b>	Uses a plug-in to view the document.
<b>Navigation Buttons</b> 	Allow you to go to the first, previous, next, or last Result Set page.
<b>* Note:</b> These features are only available with Internet Explorer 5.x	

**Note:** Settings changed using the Result Set toolbar are changed only for the current Result Set search. For instance, if thumbnails are enabled on the Settings page, and you have disabled them using the Result Set toolbar, they will reappear when a new query is run.

## To display a document from the result set

Click anywhere on the line of the report you would like to view. The Document View page will display with the selected document.

## Sorting and Navigation from the Result Set

### Sorting the Result Set in Netscape 4.x or Internet Explorer 4.x

Results can be sorted in ascending or descending order by any available index term. You can also clear all sorts, reverting to the original sort order.

#### To sort documents in ascending order by index term

Click on the Ascending up-arrow that corresponds to the index field you would like to sort by.

The frame will quickly reload, displaying the document list sorted in ascending order, based on the index term you chose.

#### To sort documents in descending order by index term

Click on the Descending down-arrow that appears above the index field you would like to sort by.

The page will quickly reload, displaying the document list sorted in ascending order, based on the index term you chose.

#### To revert to the original sort order

Click the Clear Sort arrows located above the Open Document icons.

The page will quickly reload, displaying the document list sorted in the original order.

**Note:** If thumbnails are enabled, you can revert to the original sort order using the Clear Sort button that appears on the Result Set toolbar.



## Sorting the Result Set in Internet Explorer 5.x

Results can be sorted in ascending or descending order by any available index term. You can also clear all sorts, reverting to the original sort order.

### To sort documents in ascending order by index term

Click once on the index field you would like to sort by.

If Sort Locally is enabled, VIEW REPORTS will re-sort the documents that were retrieved during the current query in ascending order based on the index term you chose. If Sort Locally is disabled, VIEW REPORTS will re-query the database and sort the documents it retrieves in ascending order based on the index term you chose.

### To sort documents in descending order by index term

Click twice on the index field you want to sort.

If Sort Locally is enabled, VIEW REPORTS will re-sort the displayed documents in descending order based on the index term you chose. If Sort Locally is disabled, VIEW REPORTS will re-sort the all retrieved documents.

### To revert to the original sort order

Click the Clear Sort button located in the Result Set toolbar.

The page will quickly reload, displaying the document list sorted in the original order (the order used when the Result Set page first appeared).


## Navigating through Result Set Pages


If more documents are retrieved than are configured to display on a single Result Set page, the Result Set toolbar allows you to navigate through all Result Set pages. In addition, the Result Set toolbar that is enabled when using VIEW REPORTS with Internet Explorer 5.x allows you to configure viewing and sort options without having to leave the Result Set page to change them from the Settings page. You can also search the Result Set to find documents that match specified criteria.

**Note:** Advanced sorting and viewing options are available only to Internet Explorer 5.x users.


### To navigate through documents in the Result Set

You can choose from the following options on the document menu:

Click the Next Page button () to move to the next Result Set page.

Click the Last Page button () to move to the last Result Set page.

Click the Go to First Page button () to move to the first Result Set page.

Click the Previous Page button () to return to the previous Result Set page.



The XML-based Result Set toolbar allows you to change viewing options on the fly for the current query results. The use of XML makes it possible for you to change options quickly and temporarily, without having to visit the Settings page to turn viewing options on and off. The following table describes each Result Set toolbar option and its usage.



## Document View page

When you click on a report, you will see a similar looking interface (depending on your operating system and internet browser) at the top of your screen and the selected report beneath it.

[New Search](#) | [Search Results](#) | [Download File](#) | [Print](#) | [Log Out](#)

In order to Print the document - you can:  
Download the document and print from a local application using the "download file" hyperlink.  
OR  
Set all of your browsers margins to the minimum setting and remove any header or footer code, then Print the current Page using the Print hyperlink; then select another page and print that one.

  Go To Page:

Option	Usage
<b>New Search</b>	Takes you back to the search page.
<b>Search Results</b>	Returns you to your previous results page.
<b>Download File</b>	Allows you to download the current .tiff file. Note: IE users will need to click Open, and then Save.
<b>Print</b>	Allows you to print the current document.
<b>Log Out</b>	Logs you out of VIEW REPORTS and redirects you to <a href="http://www.pdc.wa.gov/reports/index.htm">www.pdc.wa.gov/reports/index.htm</a> .
	Takes you to the previous page within that report.
	Takes you to the next page within that report.
<b>Go To Page:</b>	Takes you to a particular page within that report.
<b>%</b>	Increases or decreases the size of the current report.

## Logging Out

At the end of your session, please log out by clicking on the **Log Out** button. This terminates your VIEW REPORTS session, allowing another user to access VIEW REPORTS, and redirects you to the [View Reports](#) section of the [PDC's](#) website. You can also be logged out of VIEW REPORTS automatically after 5 minutes of inactivity.

**Note:** Improper logouts (for instance, switching Web sites or closing the browser) are not recognized by VIEW REPORTS as legitimate session conclusions.